



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) First and Final Report of Administrator, (2) Petition for Statutory Compensation to Attorney and (3) for Final Distribution on Waiver of Accounting

DOD: 9-3-05		DAN P. DRISCOLL , Administrator with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Letters issued to the Administrator, represented by Attorney Knudson, in March 2006. I&A was not filed until December 2008, and thereafter there was no activity in this matter until the Court set the matter for hearing regarding failure to file a petition for final distribution. The Administrator waives compensation; however, Attorney Knudson requests the full amount of statutory compensation. This petition does not provide any explanation for the delays in administration (two years to file I&A as opposed to the four months prescribed by code) and closing the estate (eight years as opposed to the one prescribed by code). Probate Code §§ 8800, 12205.
		Accounting is waived.	
		I&A: \$293,876.21	
		POH: \$260,472.37 cash plus the '99 Mercury Sable and the '94 Sierra Travel Trailer (See I&A values)	
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	3-21-06	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	N/A	
		Distribution pursuant to intestate succession: Laurel Minjares: \$60,850.00 plus Mercury Sable Dan Driscoll: \$58,750.00 plus Sierra Travel Trailer John Driscoll: \$64,750.00 Mavis Lynn Driscoll: \$64,750.00	

Reviewed by: skc
Reviewed on: 4-17-14
Updates:
Recommendation:
File 1 – Driscoll

(1) Waiver of First and Final Account, Report of Administrator, (2) Petition for Statutory Administrator and Attorney's Fees, and Reimbursement of Costs, (3) Petition for Final Distribution

DOD: 12-28-12		PAUL BRADLEY , Administrator sith Full IAEA with bond of \$167,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Order. See Local Rule 7.6.1.A – monetary distributions should be stated in dollars and not as a percentage of the estate. Based on the figures provided, Examiner calculates \$23,839.26 to each heir.
		Accounting is waived.	
		I&A: \$113,829.91	
		POH: \$54,674.25 (cash)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/>	PTC	Attorney (Statutory): \$4,219.73	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Costs: \$1,276.00 (filing, certified letters, probate referee, publication)	
<input checked="" type="checkbox"/>	Aff.Mail	q	
<input type="checkbox"/>	Aff.Pub.	Closing: \$1,500.00	
<input type="checkbox"/>	Sp.Ntc.	Distribution pursuant to intestate succession:	
<input type="checkbox"/>	Pers.Serv.	Paul Bradley: 50%	
<input type="checkbox"/>	Conf. Screen	Peggy Ralston: 50%	
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4-18-14
			Updates:
			Recommendation:
			File 5 – Bradley

(1) First and Final Account and Report of Status of Administration of Estate and Petition for Settlement Thereof; (2) Petition to Close the Estate, (3) for Final Distribution, (4) and Waiver of Administrator and Attorney's Statutory Compensation

DOD: 08/15/12		HARPREET BASSI , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting period: 08/15/12 – 02/18/14	1. The Petition does not address the required notice to the Franchise Tax Board pursuant to Probate Code § 9202(c). 2. Need Order. Note: The Order must conform to Local Rule 7.6.1A (monetary distributions must be stated in dollars).
Cont. from		Accounting - \$567,552.98	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$53,065.58	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$553,101.21	
<input checked="" type="checkbox"/>	Inventory	Administrator - waived	
<input checked="" type="checkbox"/>	PTC	Attorney - waived	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Distribution, pursuant to intestate succession, is to:	
	Aff.Pub.	Makhan Singh Bassi and Sukhwinder Kaur Bassi - 100% of the estate in equal shares	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	10/14/13	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	x	
			Reviewed by: JF
			Reviewed on: 04/18/14
			Updates:
			Recommendation:
			File 6 – Bassi

(1) First and Final Report of Administration and Petition for Its Settlement; Waiver of Accounting; (2) Petition for Allowance of Attorneys' Fees; and (3) Petition for Final Distribution

DOD: 08/15/13		GORDON TRUXELL , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The Petition does not state the value of the property on hand (other than the cash). 2. The Will appears to distribute the residue of the estate to a testamentary trust and not directly to the sons as proposed in the petition. Need clarification.
		Accounting is waived.	
		I & A - \$3,142,430.31	
		POH - Total value not stated (\$65,218.35 cash)	
Cont. from		Executor - waived	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney - \$44,424.30 (statutory)	
<input checked="" type="checkbox"/>	Verified	Closing- \$5,000.00	
<input checked="" type="checkbox"/>	Inventory	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/>	PTC	William Gordon Truxell - \$7,897.02 cash, plus ½ interest in real property, ½ interest in household furnishings, and various securities	
<input checked="" type="checkbox"/>	Not.Cred.	Robert Charles Truxell - \$7,897.02 cash, plus ½ interest in real property, ½ interest in household furnishings, and various securities	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	10/22/13	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 04/18/14
			Updates:
			Recommendation:
			File 7 – Truxell

Petition by Co-Trustees of Intervivos Trust to Establish Claim of Ownership Over Property

		JUDITH KAY FREITAS and OPTIMISM ONE, Successor Trustees, are petitioners.	NEEDS/PROBLEMS/COMMENTS: 1. Need Order. <u>Note:</u> The attorney provided an order for consideration at the prior hearing. It was signed on 3/24/14 in error and subsequently stricken. Therefore another order will need to be provided.
		Petitioners state ANDREW J. LAWSON and MARIANETTE LAWSON, husband and wife, established the ANDREW J. AND MARIANETTE LAWSON TRUST OF 1993 on September 22, 1993.	
Cont. from 032414, 041414		On 6/21/2005 Marianne Lawson died. On 11/24/13 Andrew J. Lawson died.	
	Aff.Sub.Wit.		
✓	Verified	The property located at 1565 E. Sample, in Fresno, which is the subject of this petition was vested in the name of Andrew J. Lawson and Marianne Lawson and joint tenants, at the death of Andrew J. Lawson. The person having possession of the real property at the death of Andrew was PATRICIA SCHMEDEL , who is not a relative of Andrew, but merely an acquaintance who moved into the real property when Andrew as extremely ill and incapacitated.	
	Inventory		
	PTC	Decedent's pour over will devises the residue of the estate, which includes the real property herein, to the Trust.	
	Not.Cred.		
✓	Notice of Hrg	Attached to the Trust is a General Assignment executed on 9/22/93, wherein the Trustors assigned and transferred all their right, title and interest in the real property to the Trust.	
✓	Aff.Mail		
	Aff.Pub.	Petitioners, in their capacity as Successor Co-Trustees, assert that the real property is property of the Trust.	
	Sp.Ntc.		
	Pers.Serv.	Petitioners pray for an order: 1. That the court determine that the real property located at 1565 E. Sample in Fresno is property of the ANDREW J. AND MARIANETTE LAWSON TRUST OF 1993.	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	Reviewed by: KT
	Aff. Posting		Reviewed on: 4/18/14
	Status Rpt		Updates:
	UCCJEA		Recommendation:
	Citation		File 9 – Lawson
	FTB Notice		

		CLAUDINE M. WALKER , Trustor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need written acceptance of trust by Bruce Bickel pursuant to Probate Code §15600.
		Petitioner states she created the irrevocable trust for the benefit of her two grandchildren (now adults): Ronald Allen Mehling II and Tracy Lynn Mehling. She and the beneficiaries all reside in Fresno County and consent to the proposed modification. The trustee, TCA TrustCorp America, administers from Washington DC; however, the trustee has resigned and consents to venue here for determining the matters presented in this petition.	
	Aff.Sub.Wit.		<p>Petitioner seeks modification of the provisions appointing successor trustees to provide flexibility in trust administration after her death. BRUCE BICKEL is currently named in the trustor's other estate planning documents, and Petitioner wishes to make the administration among her various trusts consistent. Therefore, Petitioner wishes to modify Article XV B of the trust to appoint Mr. Bickel upon resignation of the trustee, and if Mr. Bickel resigns or ceases to serve, the adult beneficiaries may appoint a successor bank or trust company by majority action or petition for court appointment.</p> <p>Petitioner also wishes to correct the identification of the beneficiary identified incorrectly in the trust as Ronald Allen Mehling. The beneficiary's correct name is Ronald Allen Mehling, II.</p> <p>Because the trust is irrevocable pursuant to Article XI, Petitioner is prevented from making these changes except on petition to this Court.</p> <p>All named beneficiaries consent and the proposed modification will not interfere with the material purpose of the trustor in creating the trust (Probate Code §15403).</p> <p>Petitioner requests the Court approve the modifications as set forth in the petition regarding the appointment of successor trustees and the correction of the name of the beneficiary, and for such other relief as the Court may deem proper.</p>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCC/JEA		
	Citation		
	FTB Notice		

Reviewed by: skc

Reviewed on: 4-18-14

Updates:

Recommendation:

File 10 – Walker

ProPer Brown, Andrew L. (pro per – mother's fiancé/Petitioner)

ProPer Jimenez, Connie (pro per – maternal aunt/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10		TEMPORARY EXPIRES 02/04/2014		NEEDS/PROBLEMS/COMMENTS:	
		<p>ANDREW BROWN, mother's fiancé, and CONNIE JIMENEZ, maternal aunt are petitioners.</p>		<p>CONTINUED FROM 02/04/14 Minute Order from 02/04/14 states: an ICWA packet is provided to the petitioners. Darnell Robinson is directed to provide his contact information to the Clerk's Office forthwith. Parties agree to participate in mediation today at 10:30 a.m. regarding visitation. The temporary is extended to 04/22/14.</p>	
Cont. from 020414		Father: DARNELL ROBINSON		<p>As of 04/18/14, nothing further has been filed.</p>	
	Aff.Sub.Wit.		Mother: CYNTHIA VALDEZ - Consent and Waiver of Notice filed 12/13/2013	<p>1. The Petitioner indicated to the CI that the minor has American Indian ancestry. Therefore, need <u>Notice of Child Custody Proceeding for Indian Child</u> (Form ICWA-030) to be completed and returned to the Probate Clerk's Office <u>as soon as possible</u>. The guardianship <u>cannot go forward</u> without this Notice. <u>60 days must elapse after the Notice is served before a guardianship can be granted</u>. A blank copy of the form is in the file for Petitioner. It should be completed and returned <u>as soon as possible</u> to the Probate Clerk's Office. The Probate Clerk's Office will complete service. <u>Note:</u> The Petition was not marked that the minor had Indian Ancestry.</p>	
✓	Verified		Paternal Grandfather:	<p>2. Need service at least 15 days before the hearing of Notice of Hearing with a copy of the <i>Petition for Guardianship or Consent & Waiver of Notice or Declaration of Due Diligence</i> for:</p>	
	Inventory		Paternal Grandmother:	<p>a. Darnell Robinson (father) – personal service required</p>	
	PTC		Maternal Grandfather: ROBERT VALDEZ – served by mail on 12/06/13	<p>b. Paternal grandfather – service by mail sufficient</p>	
	Not.Cred.		Maternal Grandmother: JANET MARIE JIMENEZ – served by mail on 12/06/13	<p>c. Paternal grandmother – service by mail sufficient</p>	
✓	Notice of Hrg		<p>Petitioners state: Da'Veon's mother, Cynthia Valdez, has been diagnosed with Stage 4 cancer and her death is imminent, she may not live to the hearing. The biological father has not been in the child's life for the entirety of it and has not seen the child since the age of three. The biological father is believed to be incarcerated in California. The mother is anxious for the child to have guardians prior to her death, which could come at any moment. Proposed guardian, Andrew Brown, has helped raise the minor and has been his father figure for most his life.</p>	<p>Reviewed by: JF</p>	
✓	Aff.Mail	w/		<p>Reviewed on: 04/18/14</p>	
	Aff.Pub.			<p>Updates:</p>	
	Sp.Ntc.			<p>Recommendation:</p>	
	Pers.Serv.	x		<p>File 15 – Robinson</p>	
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
			<p>Court Investigator Charlotte Bien filed a report on 01/24/14.</p>		